



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia Master Agreement

Order Date: 04-08-2022

CORRECT ORDER NUMBER MUST
 APPEAR ON ALL PACKAGES, INVOICES,
 AND SHIPPING PAPERS. QUESTIONS
 CONCERNING THIS ORDER SHOULD BE
 DIRECTED TO THE DEPARTMENT
 CONTACT.

| | | | |
|------------------------------|------------------------------------|-----------------------------------|------------|
| Order Number: | CMA 1300 1300 STO180000002A 6 | Procurement Folder: | 330243 |
| Document Name: | Professional Audit Services for UP | Reason for Modification: | |
| Document Description: | Professional Audit Services for UP | Change Order # 5 | |
| Procurement Type: | Central Master Agreement | Update address per vendor request | |
| Buyer Name: | | | |
| Telephone: | | | |
| Email: | | | |
| Shipping Method: | Vendor | Effective Start Date: | 2017-10-06 |
| Free on Board: | FOB Dest, Freight Prepaid | Effective End Date: | 2022-10-05 |

| VENDOR | | | |
|------------------------------|------------------|---------------------|---------------|
| Vendor Customer Code: | 000000174254 | | |
| AUDIT SERVICES US LLC | | | |
| 370 LEXINGTON AVE STE 707 | | | |
| NEW YORK | NY | 10017 | |
| US | | | |
| Vendor Contact Phone: | 212-594-5487 | Extension: | 228 |
| Discount Details: | | | |
| # | Discount Allowed | Discount Percentage | Discount Days |
| #1 | No | 0.0000 | 0 |
| #2 | No | | |
| #3 | No | | |
| #4 | No | | |

| DEPARTMENT CONTACT | |
|----------------------------|-------------------------|
| Requestor Name: | Shelly Murray |
| Requestor Phone: | (304) 341-7089 |
| Requestor Email: | shelly.murray@wvsto.com |
| 22 | |
| FILE LOCATION _____ | |

| INVOICE TO | |
|---------------------------------------|----------|
| WEST VIRGINIA STATE TREASURERS OFFICE | |
| 322 70TH ST SE | |
| CHARLESTON | WV 25304 |
| US | |

| SHIP TO | |
|---------------------------------------|----------|
| WEST VIRGINIA STATE TREASURERS OFFICE | |
| 322 70TH ST SE | |
| CHARLESTON | WV 25304 |
| US | |

4-11-22 Box

| | |
|----------------------------|----------|
| Total Order Amount: | Open End |
|----------------------------|----------|

Purchasing Division's File Copy

ENTERED

| |
|--|
| PURCHASING DIVISION AUTHORIZATION |
| <i>Linda Harper</i> |
| DATE: 4-8-2022 |
| ELECTRONIC SIGNATURE ON FILE |

| |
|---|
| ATTORNEY GENERAL APPROVAL AS TO FORM |
| <i>John S. Gray</i> |
| DATE: 4/12/2022 |
| ELECTRONIC SIGNATURE ON FILE |

| |
|-------------------------------------|
| ENCUMBRANCE CERTIFICATION |
| <i>Beverly Tolson</i> |
| DATE: 4-12-2022 |
| ELECTRONIC SIGNATURE ON FILE |

Extended Description:

Change Order No. 5 is issued for administrative purposes only and is intended to update the vendor address from 212 W 35th Street, New York, NY 10001 to 370 Lexington Ave., Ste 707, New York, NY 10017. The original contract, including all terms, conditions, prices, specifications, and change orders contained therein remain in full force and effect.

No other changes.

| Line | Commodity Code | Manufacturer | Model No | Unit | Unit Price |
|------|---------------------|-------------------|----------|------|------------|
| 1 | 84111600 | | | LS | 0.000000 |
| | Service From | Service To | | | |

Commodity Line Description: Audit services

Extended Description:

External Audit Services for Holders of Unclaimed Property

CMA STD18*02A



J. Matthew Thornton
370 Lexington Ave, Suite 707
New York, NY 10017
tel: 212.594.5487 x228
fax: 212.594.5571
mthornton@auditservicesus.com

March 10, 2022

Heather D. Harrison
Compliance Director Unclaimed Property
West Virginia State Treasurer's Office
322 70th Street
Charleston, WV 25304

Heather,

Via this letter I am pleased to announce that, as of 02/01/2022, Audit Services US, LLC has relocated its New York Office. Our new office is located as follows:

Audit Services US, LLC
370 Lexington Ave, Suite 707
New York, NY 10017

Please update our contract to reflect our current location. Thank you.

Regards,

A handwritten signature in black ink, appearing to read 'J. Matthew Thornton'.

J Matthew Thornton
Member, Director of Operations



MARK D. SCOTT
CABINET SECRETARY


STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION

W. MICHAEL SHEETS
DIRECTOR

PURCHASING DIVISION

MEMORANDUM

TO: Frank Whittaker, CPPB, Assistant Director, WV Purchasing Division

FROM: James Meadows, CPPO, General Counsel, WV Purchasing Division 

DATE: April 4, 2022

RE: HB 4499; Purchasing Affidavit; Interested Party Disclosure

Pursuant to your request, I have investigated the impact of the recently passed House Bill 4499 on the bidding/contract award process as it relates to the Purchasing Affidavit and the Interested Party Disclosure Form. More specifically, you asked if the buying staff would need to continue collecting the two forms for contracts put out to bid, but not yet awarded, prior to the law change. My conclusion is that continuing to collect those forms is not necessary.

House Bill 4499 was a bill sponsored by the Governor's office, and made effective from passage, that made changes to various provisions of the West Virginia Code to make the procurement process more efficient. Two notable changes are the elimination of the need to collect the Purchasing Affidavit (previously found in W. Va. § Code 5A-3-10a) and the Interested Party Disclosure form (previously found in W. Va. Code § 6D-1-2) prior to award. Since the need for those forms prior to award was statutorily driven, and the statutes have now been modified, I see no reason to continue collecting them.

Once concern was that the solicitations issued prior to the laws passage reference the applicable statutes and indicate that the two forms will be needed prior to award. Those references were found in term 37 and term 43 of the General Terms and Conditions. Form a priority standpoint, the change to the law would certainly trump the solicitation's terms and conditions. To help explain that inaccurate statement and the lack of the two forms in the procurement file,

however, please request that procurement staff include a copy of this memo in all solicitation files that went out to bid prior to HB 4499 passing and contain the old versions of term 37 and term 43.